

## 2020 PERSONAL INCOME TAX QUESTIONNAIRE

PERSONAL INFORMATION			
Full Name	S.I.N.	Birthdate	Citizenship
Address		Marital status	Date of change
Phone	Cell	Email	
Do any family members have a disability or impairment? YES <input type="checkbox"/> NO <input type="checkbox"/>		Province or territory of residence on December 31, 2020:	
SPOUSE INFORMATION			
Full Name	S.I.N.	Birthdate	Citizenship
Are we preparing your spouse's return?		YES <input type="checkbox"/> NO <input type="checkbox"/>	
If not, please provide spouse's net income from line 23600 of his/her 2020 return			
CHILDREN INFORMATION			
Full Name (Child 1)	S.I.N.	Birthdate	Citizenship
Attending Post-secondary Education	YES <input type="checkbox"/> NO <input type="checkbox"/> - <i>if yes, please attach T2202/TL11A</i>		Income
Full Name (Child 2)	S.I.N.	Birthdate	Citizenship
Attending Post-secondary Education	YES <input type="checkbox"/> NO <input type="checkbox"/> - <i>if yes, please attach T2202/TL11A</i>		Income
Full Name (Child 3)	S.I.N.	Birthdate	Citizenship
Attending Post-secondary Education	YES <input type="checkbox"/> NO <input type="checkbox"/> - <i>if yes, please attach T2202/TL11A</i>		Income
INCOME SOURCE CHECKLIST			
Employment/Commission or Scholarship income (T4 or T4A) <input type="checkbox"/>	Limited Partnerships (T5013) <input type="checkbox"/>		
Professional Association Benefits Received (T4A) <input type="checkbox"/>	Rental Property (please complete worksheet) <input type="checkbox"/>		
Pension (T4A/T4OAS/T4AP) <input type="checkbox"/>	Support Payments Received <input type="checkbox"/>		
Employment Insurance Benefits (T4E) <input type="checkbox"/>	RRSP, DPSP, RPP, RRIF (T4RSP/T4A /T4RIF) <input type="checkbox"/>		
Interest/Dividends/Capital Gains(T5/T5008) <input type="checkbox"/>	Self-employment, if you are not incorporated (please complete worksheet) <input type="checkbox"/>		
Estates/Trusts/Mutual Funds (T3) <input type="checkbox"/>	Other Income (provide details) <input type="checkbox"/>		
Details on any cryptocurrency transactions during the year <input type="checkbox"/>	Details on any revenue earned from the sharing economy (Uber, AirBnB, etc.) (please complete the self-employment and/or rental property worksheet) <input type="checkbox"/>		
COVID-19 BENEFITS CHECKLIST			
Canada Emergency Response Benefit (CERB) <input type="checkbox"/>	Employment Insurance (EI) program <input type="checkbox"/>		
Canada Recovery Benefit (CRB) <input type="checkbox"/>	Canada Recovery Sickness Benefit (CRSB) <input type="checkbox"/>		
Canada Recovery Caregiving Benefit (CRCB) <input type="checkbox"/>	Canada Emergency Student Benefit (CESB) <input type="checkbox"/>		
Other Federal/Provincial benefits received <input type="checkbox"/>	No COVID-19 benefits received <input type="checkbox"/>		
Did you repay any COVID-19 benefits? If yes, please indicate the type of benefits and when the benefits were repaid: <input type="checkbox"/>			

**DEDUCTIONS/ CREDITS CHECKLIST (with official receipts/lists)**

RRSP Contributions <input type="checkbox"/>	Adoption Expenses <input type="checkbox"/>
Union/Professional Dues <input type="checkbox"/>	Canada Caregiver Credit <input type="checkbox"/>
Child Care Expenses (incl. name & SIN of care provider) <input type="checkbox"/>	Disability Amount (T2201) <input type="checkbox"/>
Moving Expenses (complete T1-M worksheet*) <input type="checkbox"/>	Dependent with physical/mental impairment (provide details) <input type="checkbox"/>
Support payments paid (provide legal agreement) <input type="checkbox"/>	Student Loan Interest Statement <input type="checkbox"/>
Investment loan interest (Non-Registered Investments) <input type="checkbox"/>	Tuition Fees (T2202/TL11A) <input type="checkbox"/>
Investment Counsel Fees <input type="checkbox"/>	Medical Expenses <input type="checkbox"/>
Legal Fees (provide details) <input type="checkbox"/>	Charitable Donations <input type="checkbox"/>
Employment expenses (please complete worksheet) <input type="checkbox"/>	Political Contributions <input type="checkbox"/>
Volunteer Firefighter/Search and Rescue <input type="checkbox"/>	Labour Sponsored Fund (provincial) <input type="checkbox"/>
First- time Home Buyer <input type="checkbox"/>	Eligible educator school supply tax credit <input type="checkbox"/>
Digital News Subscription tax credit <input type="checkbox"/>	Canada Training tax credit <input type="checkbox"/>
Home office deduction (please complete worksheet) <input type="checkbox"/>	Home accessibility tax credit <input type="checkbox"/>
Other <input type="checkbox"/>	<input type="checkbox"/>

**OTHER IMPORTANT DOCUMENTS CHECKLIST**

Mutual Fund Investment Income Summary and Realized gains/losses report <input type="checkbox"/>	Tax Shelters <input type="checkbox"/>
Dependent (provide names, date of birth and SIN) <input type="checkbox"/>	Signed T1 Engagement/Representation Letter <input type="checkbox"/>
Foreign Income and Foreign Taxes Paid <input type="checkbox"/>	New clients: last three years' Notices of (Re)Assessment and tax returns <input type="checkbox"/>
Other <input type="checkbox"/>	<input type="checkbox"/>

Did you (or your spouse) dispose of real estate (including your principal residence) or investments during 2020? YES  NO   
 If so, please provide the following details (and attach sale documents) or provide realized gains/losses report.

Did you or your spouse begin to use real estate for personal purposes in 2020?  
 (where it had previously been used to generate income)? YES  NO

Did you or your spouse begin to use real estate to generate rental income (including short-term rentals) in 2020?  
 (where it had previously been used for personal purposes) YES  NO

Description of Property & Quantity	Date Acquired	Date of Disposal (or change in use)	Sales Proceeds	Original Cost (plus improvements)	Costs of Disposal

**ELECTIONS CANADA**

If you are a Canadian Citizen, do you authorize Canada Revenue Agency to provide information about you to Elections Canada?

YES  NO

### FOREIGN REPORTING

Did you (or your spouse) own or hold foreign assets (i.e. real estate, foreign stocks/bonds, digital currency, etc.) with a total aggregate cost in excess of CDN \$100,000 at any time during the year? If so, please provide a complete list.

YES  NO

Did you (or your spouse) own an interest in a foreign private corporation, foreign trust/estate or foreign partnership at any time during 2020?

YES  NO

If yes, please provide details on your interest in the foreign entity and any income/distributions in 2020.

**Important Note:** The sale of a principal residence must be reported along with a principal residence designation. Penalties will apply for non-reporting.

\*T1-M worksheet can be downloaded from Canada Revenue Agency website [www.cra-arc.gc.ca/forms](http://www.cra-arc.gc.ca/forms)